

# Frozen Seafood Reels in Spanish Sales



Courtesy of CONEXMAR

By Magdalena Escudero

**S**painish consumers have discovered the convenience of frozen products, and frozen seafood tops their to-buy lists.

While frozen products sold in Spain are divided into four categories—seafood, vegetables, prepared food products and potato fries—it is a traditional favorite, seafood, that offers U.S. exporters the best opportunity for market share.

In calendar 2002, Spain's per capita consumption of seafood weighed in at 32 kg. (1 kilogram=2.2046 pounds), more than double the EU (European Union) average. This penchant is reflected in a per capita consumption of 4 kg. of frozen fish and 3.5 kg. of frozen shellfish.

Hearty appetites translated to 360,000 metric tons of frozen seafood consumed

in 2002. Home cooking accounted for more than three-quarters of this amount, with the balance served up in the HRI (hotel, restaurant and institutional) sector.

In 2002, the most popular non-prepared frozen seafood items—which represent 75 percent of the \$1.65 billion worth and 68 percent of the 360,000 tons consumed—included: hake (28 percent in value), surimi (21 percent), prawns (16 percent) and shrimp (10 percent).

Prepared or ready-to-eat frozen fish consumption is also increasing. Total frozen fish consumption in 2002 was 132,243 tons, a 15-percent increase. Frozen shellfish sales topped 95,176 tons, a 7-percent increase. Hake accounts for 48 percent of volume, followed by squid at 14 percent.

During the first quarter of 2003, at-home consumption of frozen fish was up 6.2 percent from this period in 2002, while frozen shellfish was down 1.5 percent. By species, frozen salmon has experienced the highest increase (up 57.5 per-

cent), followed by cod (16 percent). Hake sales remained steady.

## A Ton of Imports

In 2002, Spain's total seafood imports were estimated at 1.3 million tons, worth \$3.6 billion. While still a tremendous amount, this figure was down 7.5 percent in volume and 2 percent in value from a year earlier.

Total U.S. seafood exports to Spain in 2002 came in at \$62.3 million, down from the record high of \$71 million in 2001. Even with these sales, U.S. frozen seafood claims only a 2-percent share by volume and a 1.9-percent share by value of the Spanish import market.

The port of Vigo in the Galicia region of northwest Spain is the focal point of entry for frozen seafood. The port landed 480,000 tons of seafood in 2001, worth almost \$800 million, which included imports and domestic catches. Frozen products outranked fresh five times over. Chief varieties included: hake, squid, octopus, monkfish, sole and shrimp. Top suppliers were Morocco, Argentina, EU countries, Namibia, South Africa and the Falkland Islands. ■

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## Deep Chill Demographics

**F**rozen products represent about 8 percent of total food production in Spain, and demand, especially for ready-to-eat products, increases every year.

Although an unusually large crop of seasonal vegetables induced a spike in production of non-prepared frozen products in 2002, the overall trend has been toward consumption of prepared and ready-to-eat products.

The demand for convenience compels three-quarters of Spain's consumers to buy frozen products, even with 40 percent perceiving frozen products as less nutritious than fresh foods. Half of all urbanites consume frozen products regularly—90 percent at least once a month, while more than a

third of Spanish households serve dishes from frozen products one to three times per week.

Adult males, aged 18-30, and couples with children are most likely to purchase frozen foods. Whereas women prefer vegetables, men shoppers buy more pre-cooked and ready-to-eat products, such as desserts. Young adults into convenience tend to buy products that need less preparation, while their older neighbors stock up on vegetables and seafood products.

But convenience is not the only factor determining a purchase. Besides ease of preparation, consumers buy frozen products for at least three other reasons: price, variety and quality.

For details, see FAS Report SP3017. To find it on the Web, start at [www.fas.usda.gov](http://www.fas.usda.gov), select **Attaché Reports** and follow the prompts.

